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# The Complete CRM Checklist: Must-Have Features for Your Legislative Team



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Between casework and the flood of emails your legislative office gets daily, you likely don't have much time to sit back and evaluate your constituent relationship tech. But not doing so can mean losing even more time to hangups like tech failures, lost emails, stalled cases, and more.

A constituent relationship management (CRM) system should be intuitive so it saves you time and lowers your stress. If your CRM doesn't — or if you're not using a dedicated CRM at all — it's time to reevaluate your tech.

This guide outlines nine criteria to look for in a CRM. If your CRM is lacking in any area, it may be time to try a different tool.



## Comprehensive Email Organization

Timely email responses cultivate respect and appreciation among voters, but the volume of emails staffers have to sort through generally makes this impossible without technology.

Your CRM must offer multiple tools that make your inbox more manageable. It should be able to categorize and filter emails according to subject or whether they're part of bulk messaging campaigns.

For emails that are from bulk campaigns, response templates and batch emailing features can assure constituents that they're heard without saddling your team with repetitive individual replies.

## Tools for Constituent Outreach

Proactive communication is arguably just as important as responsiveness and can do just as much to solidify a legislator's standing with voters. Newsletters and other regular updates are powerful tools for helping constituents understand how a legislator is working for them.

Normally, creating these outreach communications would be incredibly time-consuming, but Fireside has features to make them quicker, such as drag-and-drop newsletter templates. Audience segmentation tools also help by making it easy to target your messages to the right demographics.



## Intuitive Casework Tracking

Virtually every case is different and uniquely complex, so it's not surprising that casework management often falls behind schedule. Without automated workflows and project management tools, cases can easily face communication issues or other holdups.

The best CRMs have the casework management tools your staff needs to keep cases on track from beginning to end. You should be able to assign cases to the right people and set up statuses, annotations, and even customizable follow-up reminders.

Essentially, the best CRMs are also project management tools that help staff better serve their constituents.

## Constituent Data Storage

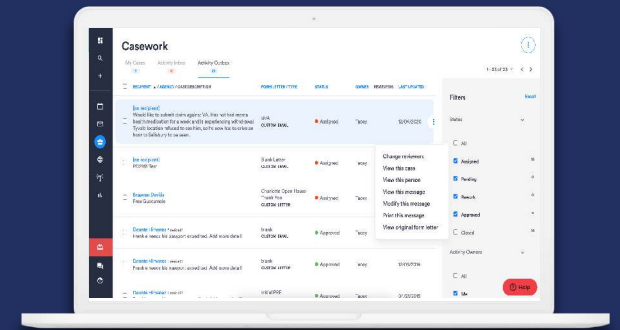
Once a constituent contacts your office, you'll want to save their information for future use. But manually filling out a spreadsheet with constituent information can take up a lot of valuable time, so it's important that your CRM stores that data for you.


A great CRM will be able to file away constituent information, tag it so you can properly target certain demographics in your communications, and update itself whenever new information about a constituent becomes publicly available.

Automated data intake in Fireside draws from every available source, including emails, surveys, and online contact forms.

## Inside the Mind of a Caseworker

Get six time-saving tips for casework success to help tackle even the most challenging workload.



Read more 

## Website Support and Integrations

A legislator's website is often the first impression they have on their constituents, so it's essential to have one that's professional, easy to navigate, and visually appealing.

Some CRMs integrate with website contact forms and even come in packages that include web support. Having extra support can help your legislator get their website off the ground quickly and save money by avoiding a third-party website developer.

## Simple Reporting

Without reports to measure your success, how can you be certain you're serving your constituents as well as you want to?

An ideal CRM solution will be able to produce several types of reports – from casework success rates to email response times. These reports should be attainable with minimal manual effort.



## Data Security

Legislative offices must abide by stringent data security standards, and registered government software providers are certified to meet these standards. A CRM from a registered provider, like Fireside, is not only ideal but also necessary for compliance.

## Customer Support

If your office ever has trouble with your CRM, you don't want to take time out of your day to troubleshoot it yourself. A worthwhile CRM should have an on-call customer support team. It should also offer thorough onboarding and training to minimize the chance that you'll have any problems in the first place.

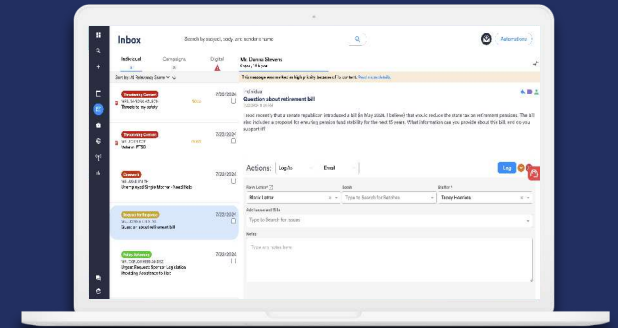
## Ease of Use

There are a lot of software tools in the government space that are outdated, confusing, or difficult to navigate. Your CRM doesn't have to be one of them.

You'll save time working with software that has a clean interface, intuitive navigation, and simple processes. When evaluating CRMs, prioritize ones with a modern design and straightforward user experience.

## #1 in Customer Satisfaction

Fireside has a 100% retention rate among Congress freshman members, showcasing unparalleled trust and satisfaction.



Request a Demo



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## Fireside: Everything You Need for Great CRM

Your staff is too busy to deal with a clunky, outdated CRM.

If you want to speed up your operations and ensure all constituents feel seen and supported, choose Fireside, a comprehensive CRM that checks all the boxes.

### Fireside meets all nine criteria with its:

- ✔ **Easy email communication** powered by automated inbox organization that sorts your mail, assigns it to team members, and lets you create templated responses.
- ✔ **Drag-and-drop newsletter creation** and other simplified outreach tools that help you save time when developing engaging messaging.
- ✔ **Exceptional casework workflow management**, including features like status tracking, workflow creation, and automated reminders.
- ✔ **Constituent data storage** that pulls information from emails, cases, and website forms and automatically keeps it updated.
- ✔ **Custom website support** and development done exclusively for you by the Fireside team.
- ✔ **Comprehensive reporting tools** that allow you to choose from dozens of different report types, helping you track your office's efficiency and effectiveness.
- ✔ **Data security** as mandated by law of all government software providers.
- ✔ **A great customer support team** that provides dedicated onboarding, on-demand training, and digital tech support.
- ✔ **An easy-to-use interface** that's simple, intuitive, and ready for the modern legislative office.

## A Comprehensive Solution

The organizational tasks required to do your job are necessary but often time-consuming.

That's why a tool like Fireside is such a big help when it comes to responding to and communicating with constituents.

Save time and reduce stress with Fireside, the only truly integrated platform for constituent management, communications, and outreach.

**Request a Demo**





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